NEW YORK STATE | Office of Temporary and Disability Assistance

Request for Proposals

Services to Older Refugees Program

Release Date: 12/2/2025
Submission Deadline: 1/16/2026

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Part A. Summary Information

I. Introduction

The Bureau of Refugee Services (BRS) of the New York State Office of Temporary and Disability Assistance (OTDA) issues this Request for Proposals (RFP) to solicit applications from qualified applicants to administer the Services to Older Refugees Program (SORP).

NOTE: For the purpose of this RFP, eligible persons as defined in Part A, Section VIII. Eligible Participants will hereafter be referred to as “refugees” unless special circumstances apply.

OTDA anticipates distributing $3,125,000 in SORP funds for 60-month contracts under this procurement. All program funds allocated for the administration of the program are received from the federal Office of Refugee Resettlement (ORR) and subject to continued availability and State appropriation thereof. Use of these funds must relate to the provision of activities that support integration and wellness for older refugees. Other costs, such as construction and renovation costs, are not allowable under this program.

If selected, the proposal and all parts of it submitted in response to this RFP may become part of a contract with OTDA, subject to approval by the New York State Attorney General (AG) and the Office of the State Comptroller (OSC). At the time of contract development, awardees may be required to submit additional program information and any revised Minority/Women Business Enterprise (M/WBE) forms and documents for the final contract. Successful applicants will be required to submit all final contract documents, narratives and budgets in the Statewide Financial System (SFS).

II. Registration and Prequalification Requirements

Pursuant to the New York State Division of Budget Bulletin H-1032 (revised), dated January 19, 2025, not-for-profits are required to register in SFS and complete the Vendor Prequalification process in order for proposals to be evaluated. Information on these initiatives can be found at the NYS Grants Management website.

Below is a summary of the steps that must be completed to meet registration and prequalification requirements.

Registration for the Statewide Financial System

Applicants must be registered in SFS to compete for New York State grants and are strongly encouraged to initiate this process as soon as possible to participate in this opportunity. Complete instructions on how to register in SFS are available here.

In addition to the support resources available to SFS users on the SFS website in the SFS Coach Training section (such as manuals, videos, webinars and FAQs), SFS provides live help desk support for SFS users.

- Hours: Monday – Friday 8:00 a.m. to 5:00 p.m.
- Phone: (518) 457-7737 or (877) 737-4185
- Email: helpdesk@sfs.ny.gov

Prequalification

Not-for-profit organizations must prequalify to do business with New York State agencies before they can compete for State grants. This process enables not-for-profit organizations to address questions and concerns before entering a competitive bid process. Not-for-profit organizations are strongly encouraged to begin the prequalification process as soon as possible.

To become prequalified, a not-for-profit organization must first register in SFS. Once registered, not-for-profit organizations complete an online prequalification application. This includes completing a series of forms by answering basic questions regarding the organization and uploading key organizational documents. Additional information on prequalification can be found at https://grantsmanagement.ny.gov/get-prequalified.

Grant proposals received from not-for-profit applicants that are not prequalified in SFS at the application due date and time will not be evaluated and will be disqualified from further consideration.

Specific questions about the prequalification process should be referred to the SFS help desk at helpdesk@sfs.ny.gov.

III. Procurement Schedule/Submission Guidelines

OTDA reserves the right to modify the following dates in this RFP:

- Release Date of the Request for Proposals: 12/2/2025
- Deadline for Written Questions: 12/16/2025
- Response to Questions: 12/30/2025
- Due Date and Time for Proposals: 2:00 PM on 1/16/2026
- Anticipated Notification of Awards: 3/15/2026
- Anticipated Contract Start Date: 7/1/2026

Questions and Answers Regarding this Request for Proposals

Prospective applicants may submit questions via email to BRS.RFP@otda.ny.gov. Be sure to reference the SORP RFP in the subject. Questions must be submitted no later than 12/16/2025.

Questions and answers will be posted on OTDA's website on the Contracts and Grants Opportunities web page by 12/30/2025.

OTDA reserves the right to respond to questions submitted after the deadline.

Proposal Submittal

Applications must be submitted electronically via the SFS Vendor Portal by 2:00 PM on 1/16/2026. To ensure SFS successfully accepts the application, applicants are strongly encouraged to complete the electronic application submission process **several days before the application due date. Once the deadline has passed, SFS will no longer accept applications.**

IV. Federal Authority

ORR is authorized to fund the Services to Older Refugees Program opportunity pursuant to §412(c)(1)(A) of the Immigration and Nationality Act (INA), 8 U.S.C.§1522(c)(1)(A), as amended. The Services to Older Refugees Program is found under Catalog of Federal Domestic Assistance (CFDA), No. 93.566, of the Department of Health and Human Services (DHHS) program title, Refugee and Entrant Assistance Discretionary Grants.

SORP must be provided in accordance with 45 CFR Part 400.

More information regarding SORP can be found in ORR Policy Letter 22-08.

V. Eligible Grant Applicants

Only proposals submitted by eligible grant applicants, as defined below, will be accepted for review. Proposals submitted by ineligible applicants will not be reviewed.

Eligible grant applicants include:

- Nonprofit corporations incorporated, registered and in good standing with the Charities Bureau of the Attorney General in the State of New York;
- Faith-based organizations;
- Educational institutions.

Eligible applicants must also:

- Be located in and do business in New York State;
- Be registered in SFS as outlined in Part A, Section II. ;
- Nonprofit applicants must be prequalified in SFS as outlined in Part A, Section II.

VI. Program Description

The purpose of SORP is to provide comprehensive case management and activities for participants that aim to support their integration and wellness, including gaining access to mainstream services within their respective communities so they may live independently for as long as possible. Through collaboration with local service providers, SORP providers must engage the refugee communities most in need of services and ensure that outreach and case management services are provided in a culturally and linguistically appropriate manner.

An additional program goal is to help older refugees to become naturalized United States (US) citizens, so that they may receive federal benefits such as Supplemental Security Income (SSI).

Successful SORP proposals demonstrate the applicant's ability to improve access, services, and outcomes for the eligible population by focusing on the following areas:

1. Assessing needs of older refugees and coordinating the appropriate services, including those that are not available in the community.
2. Creating opportunities that enable older refugees to live independently as long as possible.
3. Developing opportunities for older refugees to connect with their communities to avoid isolation.
4. Helping older refugees access mainstream aging services in the community by establishing or expanding working relationships with state or local agencies on aging.
5. Assisting older refugees on the path to citizenship by taking a comprehensive approach that incorporates all of the various pathways to citizenship that an older refugee may utilize.

VII. Service Strategy

SORP consists of the following deliverables:

- Cross Training
- Community Education Workshops
- Socialization and Community Engagement
- Assessment
- Case Management Services
- Naturalization Assistance
- Interpretation and Translation Services
- Services to Older Refugees Five-Years Post Arrival

Cross Training

Cross Training is the collaboration between a SORP provider and other relevant agencies, service providers, or community members whereby awareness about older refugees is brought to their attention. Capacity building and coordination between the agencies then occurs to effectively serve older refugees in a culturally and linguistically appropriate manner that reduces duplication of services.

Cross Training agencies and providers encourages a structure for regular and frequent collaboration between the SORP provider and outside agency. The ongoing communication between the agencies will result in the increased capacity of the community to identify and serve older refugees, thereby better meeting their needs.

The SORP Cross Training deliverable is not limited to aging network service providers. For example, a valid Cross Training could be a meeting between a SORP provider and a local office for neurology, whereby the SORP provider helps to educate the medical staff on how to complete the USCIS N-648 Form (Medical Certification for Disability Exceptions). Medical staff could benefit from training that helps them to explain the nature and extent of an applicant's medical condition and how it relates to their inability to comply with the educational requirements for naturalization.

Additionally, SORP providers must facilitate Cross Trainings which include domestic senior groups that provide cultural, historical, and practical information about refugee populations in their local community. These trainings will help to address misconceptions that domestic seniors may have about their refugee peers and assist in integrating the two communities.

Cross Trainings should be meetings initiated for the sole purpose of SORP. OTDA requires that a **minimum of six** Cross Trainings occur per budget period, and at least one Cross Training per budget period must be held with the local Office for the Aging in the county where a participant is receiving services, to effectively coordinate with existing aging services infrastructure and make mainstream aging services more accessible to participants.

Community Education Workshops

The Community Education Workshop deliverable is an event hosted by a SORP provider with the assistance of other local service providers, in the primary languages of the eligible population to provide information about or improve access to information about supportive services, nutrition services, meal delivery, prevention of elder abuse, senior community centers, and intergenerational activities. These workshops are an avenue to disseminate informational resources that have been translated and may serve as the first step in identifying older refugees who are not currently receiving SORP services, to schedule intake appointments to assess their needs and determine eligibility.

Community Education Workshops must be hosted at venues convenient to the eligible population. For example, they may be hosted at a refugee service provider site, the local Office for the Aging, English as a New Language (ENL) classes, senior nutrition sites or public libraries.

Community Education Workshops should be gatherings initiated for the sole purpose of SORP but may include domestic seniors to encourage mutual learning and integration.

SORP providers must offer participants free transportation to Community Education Workshops, interpretation in their preferred language and translations of any distributed materials to ensure that all barriers to attending have been removed for all participants. OTDA requires that a **minimum of four** Community Education Workshops occur per budget period, and at least one per budget period must be on the topic of US naturalization and the naturalization assistance services that are available to participants.

Socialization and Community Engagement

SORP providers must use SORP funds to create and facilitate opportunities for older refugees to engage in social and cultural activities consistent with Executive Order 190 (EO 190) to encourage them to connect with their communities and avoid isolation. A SORP provider may also connect older refugee populations with local volunteers or community navigators who help people find their way to these types of activities within the local community.

Wherever possible, SORP providers must endeavor to create opportunities for domestic seniors and senior refugees in the community to connect and interact with one another. SORP providers are encouraged to convene Socialization and Community Engagement activities that both groups are invited to, with adequate interpretation services made available to facilitate conversation and cultural exchange amongst the various parties.

Assessment

The Assessment deliverable comprises determining the scope of needs of the older refugee, developing a plan of action to meet those needs and preparing a Case Management Plan which will include all of the services that are initially planned for the older refugee. The Assessment deliverable is a pre-requisite to the Case Management Services deliverable and is comprised of three separate tasks. In order to claim an Assessment deliverable, the Contractor must 1.) schedule intake and determine eligibility of an eligible participant, 2.) assess the current needs of the Participant and 3.) create a Case Management Plan to address those identified needs. Following Assessment, a Contractor will provide Case Management Services and update and adjust the Participant’s Case Management Plan as needed.

Recognizing that the needs of a participant may change significantly in a short period of time, a SORP provider may provide up to **four additional** Assessment deliverables to an individual after conducting the initial assessment during the 60-month contract term. These additional Assessments may only be performed when a significant life-changing event occurs in the life of the participant which drastically changes their needs.

Case Management Services

Following Assessment, a SORP provider must facilitate an individual’s access to the relevant services and activities identified in the Assessment and written in the Case Management Plan by providing Case Management Services. Case management is a multi-step process to ensure access to and coordination of services, in order to ensure independent healthy living for older refugees. This process may include the provision of services directly by a SORP provider and/or referrals to and facilitated engagement in programs and/or services from outside agencies for identified service needs. As services are provided, a SORP provider must document all activities and services provided, track an individual’s progress toward meeting their needs and goals, and update and adjust the Case Management Plan accordingly.

Bilingual staff or interpreters must assist with Case Management Services as needed. OTDA expects a SORP provider to assess the older refugee’s needs and provide services and/or referrals in the following categories:

1. Housing Assistance
2. Public Benefits Application Assistance
3. Medical/Mental Health Care and Counseling
4. Supportive Services
5. Legal Services
6. Food and Nutritional Assistance
7. Other Identified Service Needs as approved by OTDA

Housing Assistance

A SORP provider must have the experience and ability to provide housing assistance to older refugees which may include services such as eviction and homelessness prevention, assistance with finding affordable and/or accessible housing, and assistance with long term care placement. A SORP provider may need to assist older refugees in securing or maintaining safe housing and/or living arrangements that help to promote their ability to live independently for a longer period of time consistent with EO 190 and the World Health Organization’s “Eight Domains of Livability.”

Public Benefits Application Assistance

A SORP provider must be prepared to assist all eligible participants in obtaining public benefits for which they are eligible such as Supplemental Nutrition Assistance Program (SNAP), Medicaid and SSI. Additionally, providers must assist participants to maintain their eligibility for these benefits.

Medical/Mental Health Care and Counseling

A SORP provider must have the ability to provide or connect older refugees with services in order to address health concerns, provide education and promote a healthy lifestyle and disease prevention. Consistent with EO 190, types of services may include routine health screening, physical fitness programs, mental health screening and counseling services, medications management screening and education, and chronic disease self-management education programs.

Supportive Services

Supportive Services are designed to support and empower older refugees to be as independent as possible for as long as possible through advocacy and effective case management. Consistent with EO 190, Supportive Services may include participation in intergenerational activities, arranging for home care, adult day care, respite care, nursing home ombudsman services, transportation, and elder abuse prevention.

Legal Services

Many older refugees are unaccustomed to the laws and their legal rights and responsibilities in the US and/or cannot afford the costs of legal assistance to address particular legal issues or problems. In accordance with 45 CFR Part 400, SORP providers may provide application assistance in obtaining Employment Authorization Documents (EADs) and adjustment to legal permanent resident status. For participants that require additional legal assistance, SORP providers should provide them with referrals to outside legal services providers. OTDA expects a SORP provider to comply with all applicable statutes, regulations and ethics opinions governing immigrant consultants and the authorized practice of law.

Food and Nutritional Assistance

Older refugees may be unfamiliar with how to obtain and/or prepare meals in the US, or they are unable to prepare meals for themselves and do not have a caregiver to assist them. A SORP provider should provide access to and education about food and nutrition to older refugees by providing services such as arranging for congregate nutrition services (community dining), meal delivery for homebound participants, grocery store orientation, assistance accessing community food pantries, and nutrition education and counseling.

Other Identified Service Needs

A SORP provider may request approval from OTDA to provide any other specific services not listed.

Interpretation and Translation Services

Interpreters must work on an as-needed basis with individual SORP participants as they receive Case Management Services, Referrals and Naturalization Assistance. Additionally, important documents and materials must be translated in the primary languages of SORP participants to assist them in meeting the needs and goals. All Interpretation and Translation Services must be related to providing services under this program. Interpretation and Translation Services may be provided to all SORP participants regardless of their eligibility date.

Naturalization Assistance

SORP providers must create an Individual Naturalization Plan for every SORP client wishing to become a naturalized US citizen. The Individual Naturalization Plan should incorporate all available pathways to become a US citizen as described in 8 USC §1423, including the USCIS 50/20, 55/15 and 65/20 English language exemptions, as well as comprehensive case management services to help participants obtain N-648 Medical Certification for Disability Exceptions waivers if they may have a valid disability.

Towards this end, the Individual Naturalization Plan form developed by BRS should be completed with the participant during a Naturalization Assistance counseling session. The Individual Naturalization Plan form in conjunction with the counseling session should act as a diagnostic tool to determine the best pathway towards citizenship for each participant and will both guide and track the participant's progress towards achieving their naturalization goal.

Allowable Naturalization Assistance activities include Naturalization Assistance counseling sessions, English as a New Language (ENL)/Civics instruction specifically tailored to older refugees to help them prepare for the English and/or US history and civics portions of the naturalization test, assistance with application completion for the forms N-400, N-648, and I-912 and any other applicable forms or waivers. SORP providers may also accompany participants to the naturalization interview, but SORP funds may not be used for naturalization application fees.

Only licensed attorneys or Department of Justice (DOJ) accredited representatives approved by the DOJ working through recognized organizations are permitted to complete immigration applications on behalf of SORP participants and represent them during naturalization interviews.

Naturalization Assistance may be provided to all SORP participants regardless of their eligibility date.

Services to Older Refugees Five-Years Post Arrival

Participants whose date of eligibility is 61-months ago or longer may only receive referrals to other programs or agencies for direct services in the following categories:

1. Housing Assistance
2. Public Benefits Application Assistance
3. Medical/Mental Health Care and Counseling
4. Supportive Services
5. Legal Services
6. Food and Nutritional Assistance
7. Other Identified Service Needs as approved by OTDA

VIII. Eligible Participants

In the event of federal regulation changes that affect the program eligibility, SORP providers will be notified of the change and required to comply with the new criteria for participant eligibility.

SORP funds must be used for services to individuals who meet program eligibility based on their immigration status, age, and eligibility date as described below. SORP providers are responsible for confirming each participant's eligibility prior to enrollment and must maintain acceptable documentation in the participant's case file that clearly demonstrates eligibility for the program.

Additional information can be found here: https://acf.gov/orr/policy-guidance/status-and-documentation-requirements-orr-refugee-resettlement-program

Eligible Immigration Status

1. Individuals paroled as refugees or asylees under § 212(d)(5) of the Immigration and Nationality Act (INA);
2. Refugees admitted under § 207 of the INA;
3. Asylees whose status was granted under § 208 of the INA;
4. Cuban and Haitian entrants, in accordance with the requirements in 45 CFR § 401.2
   a. Any individual granted parole status as a Cuban/Haitian Entrant (Status Pending) or granted any other special status subsequently established under the immigration laws for nationals of Cuba or Haiti, regardless of the status of the individual at the time assistance or services are provided;
   b. A national of Cuba or Haiti who was paroled into the United States and has not acquired any other status under the INA and with respect to whom a final, non-appealable, and legally enforceable order of removal, deportation or exclusion has not been entered;
   c. A national of Cuba or Haiti who is the subject of removal, deportation or exclusion proceedings under the INA and with respect to whom a final, non-appealable, and legally enforceable order of removal, deportation or exclusion has not been entered;
   d. A national of Cuba or Haiti who has an application for asylum pending with DHS/USCIS or Department of Justice (DOJ)/EOIR and with respect to whom a final, non-appealable, and legally enforceable order of removal, deportation or exclusion has not been entered;
5. Victims of a severe form of trafficking in persons per the Victims of Trafficking and Violence Protection Act of 2000, Pub. L. No. 106-386, as amended, 22 U.S.C. § 7105(b) (1) (A) and (C);
6. Lawful permanent residents provided the individuals previously held one of the statuses identified above (Note that this does not refer to Amerasians who are admitted as lawful permanent residents, or to Iraqi and Afghan Special Immigrants. See #7 and #8 below.);
7. Certain Amerasians from Vietnam who are admitted to the United States as immigrants pursuant to § 584 of the Foreign Operations, Export Financing, and Related Programs Appropriations Act, 1988 (as contained in § 101(e) of Public Law 100-202), as amended (8 U.S.C. § 1101 note);
8. Iraqi and Afghan Special Immigrants per section 1244(g) of Div. A of Pub. L. 110-181, as amended (8 U.S.C. § 1157 note) and section 602(b)(8) of Div. F of Pub. L. 111-8, as amended (8 U.S.C. § 1101 note);
9. Afghan individuals with SI/SQ Parole (aka Afghan Special Immigrant Parolee);
10. Afghan individuals with Special Immigrant Conditional Permanent Residence (SI CPR);

11. Citizens or nationals of Afghanistan paroled into the United States under section 212(d)(5) of the Immigration and Nationality Act between July 31, 2021, and September 30, 2023;
12. A spouse, as defined in section 101(b) of the INA (8 U.S.C. 1101(b)), of any Afghan humanitarian parolee described above, who is paroled into the United States after September 30, 2023;
13. Ukrainian Humanitarian Parolees:
    a. Citizens or nationals of Ukraine who the Department of Homeland Security (DHS) has paroled into the United States between February 24, 2022, and September 30, 2024, due to urgent humanitarian reasons or for significant public benefit, known as Ukrainian Humanitarian Parolees (UHPs);
    b. Non-Ukrainian individuals who last habitually resided in Ukraine, who DHS has paroled into the United States between February 24, 2022, and September 30, 2024, due to urgent humanitarian reasons or for significant public benefit;
    c. A spouse of an individual described in section 13(a) or 13(b) of this paragraph who is paroled into the United States after September 30, 2023;
    d. A parent, legal guardian, or primary caregiver of an unaccompanied refugee minor or an unaccompanied child described in section 13(a) or 13(b) of this paragraph who is paroled into the United States after September 30, 2023.

Eligibility Period

SORP providers may provide services to ORR-eligible individuals within the first 60 months of their date of eligibility but should prioritize services to those who have been in the U.S. for one year or less. Eligibility for services will expire on the last day of the 60th month following their date of eligibility.

The “Interpretation and Translation Services“, “Naturalization Assistance” and “Referrals for Older Refugees Five-Years Post-Arrival” deliverables may be provided to individuals whose date of eligibility is 61 months ago, or longer.

Eligible Age

Refugees must be 60 years of age or older in order to be eligible to receive services.

Residency Requirements

Eligible participants are required to be residents of New York State regardless of county.

IX. Funding Limitations and Provisions

Available Funds

Awards for the first budget period of SORP will be made from OTDA’s federal fiscal year (FFY) 2025 Refugee Support Services (RSS), Services to Older Refugees set-aside allocation plus FFY 2025 RSS Base Funds. It is estimated that $1,425,000 will be available for the first budget period. However, it is not anticipated that SORP funding will continue at such a level during the entire contract term. Only federal funds designated for SORP or federal funds authorized for such use are available through this RFP. Anticipated allocations and subsequent budget periods are subject to the continued availability of funds. OTDA reserves the right to increase or decrease funding for the program subject to availability of federal funds.

Distribution of Funds

The budget period one allocation will be divided among five of the six impacted areas listed below:

- Erie
- Monroe
- Onondaga
- Oneida
- Albany
- New York City (five boroughs)

For budget period one, OTDA intends to award five contracts of approximately $285,000 each.

Initial contract awards to successful applicants and the corresponding awards for budget period one are the result of this competitive procurement. During the contract term, however, subsequent budget period awards will be based on available funding, continuing need and satisfactory contractor performance, as evidenced by voucher claims and program monitoring.

Contract Term and Budget Periods

This RFP governs the provision of funds for the anticipated 60-month contract term starting on July 1, 2026, and ending on June 30, 2031.

During the course of the contract, funds will be made available to the SORP contractor for each pre-established budget period. A work plan and Attachment B-2 Performance-Based Budget Summary will be required for each 12-month budget period. Throughout the length of the contract, funds will be made available to contractors for each pre-established budget period.

OTDA anticipates that there will be five budget periods within the contract term:

- Budget Period One: July 1, 2026, to June 30, 2027
- Budget Period Two: July 1, 2027, to June 30, 2028
- Budget Period Three: July 1, 2028, to June 30, 2029
- Budget Period Four: July 1, 2029, to June 30, 2030

- Budget Period Five: July 1, 2030, to June 30, 2031

X. Program Information

Reimbursement Structure

Contracts resulting from this procurement will be performance-based. Contractors will not be reimbursed for line-item expenses but rather compensation will be directly tied to the completion of documented deliverables. Documentation of the provision of a required or allowable "task" (service) or number of tasks allows a contractor to claim an achieved deliverable. The contractor will be paid for the deliverables achieved at the established rate, as defined in the contract.

Payment Rates

Payment for deliverables are derived from unit rates proposed in each application. The applicant's award request is calculated by multiplying the rates for each deliverable by the number of deliverables to be achieved in the first twelve-month budget period.

Maximum rates have been determined using historical data for the same or similar services and were adjusted using the Consumer Price Index (CPI) to reflect increased costs for goods and services. Applicants must propose rates that do not exceed the maximum rates.

The following chart provides the maximum rates OTDA will reimburse per deliverable under this RFP.

Deliverable	**Maximum Rate**
Cross Training	$700
Community Education Workshop	$1,800
Socialization and Community Engagement	$700
Assessment	$350
Case Management Services	$700
Naturalization Assistance	$700
Interpretation and Translation Services	$200
Services to Older Refugees Five Years Post-Arrival	$700

Payment Limitations

The Assessment deliverable is limited to five per participant per contract term. The other participant-specific deliverables, Case Management Services, Naturalization Assistance, Interpretation and Translation Services and Services to Older Refugees Five-Years Post Arrival are unlimited.

Deliverables, Objectives, Allowable Tasks and Documentation Requirements

The parameters and documentation requirements of each deliverable are provided in the following chart. The applicant should use this information to project service levels and allocate funds to each deliverable.

Deliverable	Objective	Task(s)	Required Documentation
Cross Training (CT) *A minimum of six (6) CT per year are required, and one (1) CT per year must be held with the local Office for the Aging.*	The SORP provider meets with other relevant agencies, service providers, or community members to share information about older refugees to develop and increase capacity resulting in more awareness and collaboration to benefit older refugees.	Completing the required task as described in the approved Work Plan of the contract allows the SORP provider to claim one (1) **CT** deliverable. **Required Task:** 1. Conduct a Cross Training	1. Copy of the agenda and training summary, including the date, time and location and name(s) of the facilitator(s).
Community Education Workshop (CEW) *A minimum of four (4) CEW are required per year, with at least one devoted to the topic of US naturalization*	The SORP provider conducts workshops for older refugees which: • Promote awareness of services offered by SORP and mainstream aging service providers in the community • Provide courses, workshops and	Completing the required task as described in the approved Work Plan of the contract allows the SORP provider to claim one (1) **CEW** deliverable. **Required Task:** 1. Conduct a Community Education Workshop	1. Copy of the agenda and workshop summary, including the date, time and location and name(s) of the facilitator(s). 2. A list of SORP eligible individuals who attended the workshop including: a. Alien Number

Deliverable	Objective	Task(s)	Required Documentation
	other learning activities to educate and inform them about important topics and resources that will help them live independently for as long as possible		b. First Name c. Last Name d. DOB e. Status or Category f. Sex g. Nationality h. Zip Code i. City j. County k. Eligibility Date
Socialization and Community Engagement (SCE) *There is no limit to the number of SCE deliverables provided during the contract term.*	The SORP provider organizes activities which offer participants opportunities to connect with their communities and avoid isolation through engagement in social and cultural activities, consistent with EO 190.	Completing the required task as described in the approved Work Plan of the contract allows the SORP provider to claim one (1) **SCE** deliverable. **Required Task:** 1. Conduct a Socialization and Community Engagement activity	1. Copy of the agenda and activity summary, including the date, time and location and name(s) of the facilitator(s). 2. A list of SORP eligible individuals who attended the activity including: a. Alien Number b. First Name c. Last Name d. DOB e. Status or Category f. Sex g. Nationality h. Zip Code i. City j. County k. Eligibility Date

Deliverable	Objective	Task(s)	Required Documentation
Assessment *The Assessment deliverable is a pre-requisite to the Case Management Services deliverable* *Five (5) Assessment deliverables per participant may be claimed per contract term.*	The SORP provider meets with the prospective participant to determine program eligibility and perform an initial assessment of their needs and goals. Based on the assessment, the SORP provider develops a Case Management Plan to address those goals and needs through services and activities.	Completing the required tasks as described in the approved Work Plan of the contract allows the SORP provider to claim one (1) **Assessment** deliverable. **Required Tasks:** 1. Schedule intake and determine eligibility of the participant 2. Conduct an assessment of needs 3. Create a Case Management Plan	1. Proof of participant eligibility 2. BRS "Application for Services," signed and dated by participant and agency representative prior to services being provided. Agency supervisor must also sign and date the application within 30-days of the participant and agency representative signatures or prior to the submission of a voucher, whichever date is earlier. 3. Case Management Plan 4. Corresponding case note documentation
Case Management Services (CMS) *There is no limit to the number of*	The SORP provider facilitates an individual's access to the services and activities identified	Completing the required tasks as described in the approved Work Plan of the contract allows the SORP provider to claim	1. Proof of participant eligibility 2. BRS "Application for

Deliverable	Objective	Task(s)	Required Documentation
case management deliverables a SORP participant receives during the contract term.	in the Case Management Plan by providing Case Management Services directly and/or by referral. The SORP provider documents the activities and services provided and updates and adjusts the Case Management Plan as needed and tracks the progress of the participant toward meeting their needs and goals. All tasks provided under Case Management Services should be identified in the participant's Case Management Plan.	one (1) **CMS** deliverable. **Required Tasks:** 1. Provide a service or a referral within one of the following categories as described in the work plan of your contract: a. Housing Assistance b. Public Benefits Application Assistance c. Medical/Mental Health Care and Counseling d. Supportive Services e. Legal Services f. Food and Nutritional Assistance g. Other Identified Service Needs as approved by OTDA 2. Update and adjust the Case Management Plan	Services," signed and dated by participant and agency representative prior to services being provided. Agency supervisor must also sign and date the application within 30-days of the participant and agency representative signatures or prior to the submission of a voucher, whichever date is earlier. 3. Case Management Plan 4. Corresponding case note documentation 5. Other documents in support of the type of service being claimed.
Naturalization Assistance (NA) *There is no limit to the number of*	The SORP Provider completes the Individual Naturalization Plan with the participant	Completing one allowable task as described in the approved Work Plan of the contract allows the SORP provider to claim	1. Proof of participant eligibility 2. BRS "Application for

Deliverable	Objective	Task(s)	Required Documentation
NA deliverables a SORP participant receives during the contract term.	and facilitates the participant's completion of the services and activities identified on the Plan.	one (1) **NA** deliverable. **Allowable Tasks:** 1. Naturalization Assistance counseling session and completion of the Individual Naturalization Plan 2. English as a New Language (ENL)/Civics instruction 3. Assistance with application completion for the forms N-400, N-648, and I-912 and any other applicable forms or waivers 4. Representation in the naturalization interview 5. A referral to an outside program or agency for Naturalization Assistance	Services," signed and dated by participant and agency representative prior to services being provided. Agency supervisor must also sign and date the application within 30-days of the participant and agency representative signatures or prior to the submission of a voucher, whichever date is earlier. 3. Individual Naturalization Plan 4. Corresponding case note documentation 5. Other documents in support of the type of service being claimed
Interpretation and Translation Services (ITS) *There is no limit to the number of*	Interpretation and Translation Services are services provided to the SORP participant during Case Management	Completing one allowable task as described in the approved Work Plan of the contract allows the contractor to claim one Interpretation and	1. Proof of participant eligibility 2. BRS "Application for Services,"

Deliverable	Objective	Task(s)	Required Documentation
Interpretation and Translation Services deliverables a SORP participant receives during the contract term.	Services, Naturalization Assistance, or Referrals.	Translation Services deliverable. **Allowable Tasks:** 1. Interpretation 2. Translation	signed and dated by participant and agency representative prior to services being provided. Agency supervisor must also sign and date the application within 30-days of the participant and agency representative signatures or prior to the submission of a voucher, whichever date is earlier. 3. Corresponding case note documentation connecting the interpretation or translation service to a Case Management Service, Naturalization Assistance, or Referral.
Services to Older Refugees Five-Years Post Arrival (SOR5YPA)	The SORP provider refers the participant whose eligibility date is 61 months ago or longer to another	Completing one allowable task as described in the approved Work Plan of the contract allows the contractor to claim one	1. Proof of participant eligibility 2. BRS "Application for Services,"

Deliverable	Objective	Task(s)	Required Documentation
There is no limit to the number of SOR5YPA deliverables a SORP participant receives during the contract term.	program or agency to engage in services.	**SOR5YPA** deliverable. **Allowable Tasks:** Provide a referral to an outside program or agency within one of the following categories: 1. Housing Assistance 2. Public Benefits Application Assistance 3. Medical/Mental Health Care and Counseling 4. Supportive Services 5. Legal Services 6. Food and Nutritional Assistance 7. Other Identified Service Needs as approved by OTDA	signed and dated by participant and agency representative prior to services being provided. Agency supervisor must also sign and date the application within 30-days of the participant and agency representative signatures or prior to the submission of a voucher, whichever date is earlier. 3. Corresponding case note documentation

In the event of federal statutory, rule, regulation, policy, guidance or programmatic changes that affect the deliverables in the chart below, SORP providers will be notified of the change(s) and required to comply with the new requirements.

Additional Deliverable Information

- SORP providers must provide all deliverables.
- Case note documentation includes a record of all participant engagement in allowable tasks from intake to discharge. This includes a statement indicating the final disposition of the participant’s enrollment in the program. For instance: “Did the participant voluntarily withdraw?” or “Has the program met all of the participant’s needs?”
- A Case Management Services deliverable may be claimed only when the participant has completed the allowable task and the Case Management Plan has been updated and adjusted. Completion is defined as the provision of the

task in a manner that has addressed the need identified in the Case Management Plan. Case notes documenting the Case Management Services must contain enough detail to demonstrate how the provision of the service has addressed the need identified in the Case Management Plan.

- A Naturalization Assistance deliverable may be claimed only when the participant has completed the allowable task, and the Individual Naturalization Plan has been updated and adjusted. Completion is defined as the provision of the task in a manner that has addressed the need identified in the Individual Naturalization Plan. Case notes documenting the Naturalization Assistance must contain enough detail to demonstrate how the provision of the service has addressed the need identified in the Individual Naturalization Plan.
- A referral to an outside agency other than your own may be claimed only when the participant has engaged in the referral. Engagement is defined as participant's acceptance and commencement of the service.
- Interpretation is defined as oral translation for parties conversing in different languages, including the immediate communication of meaning from one language into another.
- Translation is defined as the act or process of converting written words from one language into their complete, accurate and intended meaning in another language resulting in a written document in the other language. It also includes sight translations of a written document orally into another language.
- Community Education Workshops and Socialization and Community Engagement deliverables must be provided in a culturally and linguistically appropriate manner. Transportation, interpretation and translation are built into the payment rates for these events and should not be claimed individually for participants attending them.

XI. Selection Process

Evaluation Process

Each proposal will be read and scored by at least two reviewers from OTDA. Proposals will be reviewed in accordance with the evaluation criteria referenced below. Scores will be averaged, and the average scores will be ranked from highest to lowest. More than one proposal to provide services in a particular impacted area, as defined in the Award Methodology below, will be reviewed competitively with other proposals to provide services in that impacted area. For example, Erie County applications will be compared only with other Erie County applications.

Regardless of score, OTDA reserves the right to fund or not fund an application based on other relevant information, such as the occurrence of SORP funds supplanting existing funds, an applicant's financial position, vendor responsibility determination and the status of the applicant's NYS Office of the Attorney General Charities Registration filing.

OTDA reserves the right to conduct site visits and solicit the opinion of applicants' other funding sources prior to making a funding decision.

Evaluation Criteria

- The responsiveness of the proposal to the RFP (meaning that all information and documentation required by this RFP are provided in a satisfactory manner to determine agency viability and project activities, goals and fundability);
- Evidence of the applicant's understanding of the needs of the older refugee population;
- The programmatic and fiscal feasibility related to the overall management and operation of the project, including the project operating budget, revenue streams and the agency's financial position;
- The completeness of the application questions, required documents and budget portions of the application, through the provision of both statistical data and agency specific information regarding the experiences of the eligible grant applicant in serving the eligible population;
- The clarity of the measurable and quantifiable expected results and potential for their achievement;
- The overall cost reasonableness and effectiveness of the proposed project;
- Assurances that the requested funds will be expended in a timely manner once a contract has been executed between OTDA and the applicant;
- The applicant's contractual performance history with OTDA or other NYS funding sources (where applicable);
- The applicant's past experience with similar programs, if applicable, that demonstrates the benefits realized as a result of such funding and provides strong justification for the need for SORP funding;
- The applicant's standing with NYS (such as compliance with the requirements of the Attorney General's Office, Worker's Compensation, etc.);
- Assurances of the urgency of need for SORP funds, and that duplication of services will be avoided in the geographic area in which the SORP program will operate;
- A commitment to make all SORP related records available to OTDA or its designee(s) as required by this RFP and any resultant contract;
- Clear and acceptable documentation of the applicant's operational readiness for the proposed project;
- The applicant's demonstrated coordination with the local social services district, the local Office for the Aging and other stakeholders that serve the elderly population.

Proposals will be prioritized based on the following criteria:

- Projects fully endorsed by the local Office for the Aging as evidenced by a letter of support;

- High priority will be awarded to applicants showing strong evidence of need and demonstrating a program appropriately responsive to the need;

- Projects that demonstrate a clear process to provide case management and other needed services and strong method of outreach.

Regardless of score, OTDA reserves the right to disqualify an application based on other relevant information, such as the occurrence of SES funds supplanting existing funds; an agency's financial position; finding or issues raised by other Government funders; an agency's prequalification status in SFS; vendor responsibility determination and the status of the NYS Office of the Attorney General Charities Registration filing.

The following is provided as the relative weight for each section of the application:

- **Program Specific Questions, Required Documents and OTDA Priorities (75%)**
- **Budget (25%)**

  In addition to the above criteria, proposals will also be rated based on the budget period one funds requested divided by the proposed total number of Case Management Services units and Naturalization Assistance units.

Award Methodology

A maximum of one award will be made per impacted area. For instance, if OTDA receives applications from all six of these areas, the highest scoring applicant will be selected, the next highest scoring applicant from a different area will be selected and the next highest scoring applicant from a third different area will be selected, etc.

OTDA intends to award the available funds evenly amongst the five awardees until the budget period one funding allocation is exhausted.

The following exceptions apply:

- A monetary cap may be placed on the funding amount made in each contract award, and/or awards may be made for less than the amount requested or greater than the amount requested.
- This RFP intends to make no more than one award per region.
- Awards may be reduced or increased to address statewide priorities and needs.
- If, after making awards, there is a balance of available funding, OTDA may proportionally award the balance to the awardee(s) based on the requested amount.
- OTDA reserves the right to increase an award to distribute the entire funding allocation.

In the event of a tie score per region, OTDA reserves the right to:

- Use methods to further evaluate the tied applications in order to break the tie; or
- Engage additional reviewers to review the tied applications; or

- Award each applicant a prorated portion of the funds based upon funds requested and the amount available.

If additional funding becomes available, or if circumstances otherwise allow OTDA to fund additional contractors, OTDA reserves the right to subsequently reconsider eligible proposals submitted in response to this RFP using the same scoring criteria and award methodology. Updated information may be requested as deemed necessary by OTDA.

If additional funding becomes available, OTDA reserves the right to distribute the funding among any or all of the contract awardees. OTDA also reserves the right to issue a new RFP at any time during the contract term to solicit new proposals.

During the contract term, subsequent budget period awards may be based on one or more of the following factors:

- Available funding;
- State needs and priorities;
- Demographic data;
- Satisfactory contractor performance (as evidenced by voucher claims and program monitoring).

When making subsequent budget period awards, OTDA reserves the right to do any of the following:

- Reallocate funding from contractor to contractor;
- Reallocate funds from one region to another;
- Suspend a budget period award to an underperforming contractor;
- Award a lesser budget period award to an underperforming contractor and reallocate the funds to a satisfactory or overperforming contractor(s);
- Adjust budget period awards to further the State's priorities and needs.

Maintenance of Effort

Funds awarded through SORP must be used by an applicant for a new service or a quantifiable increase in the level of service above that provided during the immediately previous twelve-month period. This provision prohibits using SORP funds to replace existing government or non-profit funding of services. However, once a new or increased level of service meets the above standards, SORP funds may be used to continue funding that service in subsequent years.

XII. Award Procedures

It is the policy of OTDA to provide all program Applicants with an opportunity to resolve complaints or inquiries related to bid solicitations or pending contract awards administratively. OTDA encourages all Applicants to seek resolution of complaints concerning the contract award process through consultation with OTDA. All such matters will be accorded impartial and timely consideration. Detailed procedures are provided on the OTDA website at Contracts & Grant Opportunities. OTDA continues to encourage all Applicants who desire a debriefing to contact OTDA directly.

An appeal may be requested by following the protest procedures established by the Office of the State Comptroller (OSC). These procedures can be found in the OSC Guide to Financial Operations here. Additional information is also available in OSC's Guide to Financial Operations, Chapter XI Procurement and Contract Management, 17. Protest Procedures.

Contract Development Process

OTDA will initiate the contract development process with successful applicants following the announcement of awards. Successful applicants may be asked to provide updated work plans and budget summaries that specify the services to be delivered, project goals, deliverables, and the process for claiming funds. The contract will include standard terms and conditions such as confidentiality of records, publications and contract termination. The contract will constitute a legally binding agreement between the selected applicant and OTDA and will be in effect for the full term of the contract.

The contracts will have a term of 60 months and will contain work plans and budget summaries for each 12-month budget period.

Payment

The Contractor will not be reimbursed for line-item expenses. Under performance-based contracts, the Contractor will be paid for achieving specified deliverables described herein. Payment will be made only for deliverables for which outcomes are documented and for which vouchers are submitted by the required due date.

No payments will be made until the contract is fully executed and signed by the State Comptroller and the State Attorney General. Once the contract has been fully executed by OTDA (signed and approved by OTDA, the State Attorney General and the Office of the State Comptroller), OTDA may, at its discretion, advance up to 25 percent of the first budget period amount, if requested and if deemed appropriate by OTDA. There will be no advances for subsequent budget periods. Contractors will work at their own risk if they conduct program activities prior to the contract being executed.

XIII. Reports and Record Keeping

Record Keeping

The contractor must maintain current and accurate fiscal and accounting controls to support the claims for deliverables and/or outcomes claimed under the contract. Records must adequately identify revenue sources and expense items for all contract activities. Accounting records must be supported by clear documentation for all funds received and disbursed. Records must be retained and be accessible for a period of six years from the end of the contract, the last payment, or the last contract transaction.

However, if any claim, audit, litigation, or State/Federal investigation is commenced before the expiration of the aforementioned record retention period, the records must be retained by the contractor until all claims or findings regarding the records are finally resolved. OTDA or its designee shall have access to any records relevant to the project (including but not limited to books, documents, photographs, correspondence, and records), for audits, examinations, transcripts, and excerpts. If OTDA determines that such records possess long-term or historic value, they must be transferred, upon request, to OTDA.

If the Contractor expends $750,000 or more in Federal funds during any one fiscal year, the Contractor will be subject to the Audit Requirements and provisions of OMB Super Circular, found in Federal regulations at 2 CFR Part 200 (Subparts A – F) - Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards; and, all other audit requirements determined applicable by the OTDA. The audit shall be completed on an annual basis and the audit report submitted within the earlier of 30 days after receipt of the auditor's report(s), or nine months after the end of the audit period, unless a longer period is agreed to in advance by the OTDA. The audit shall be conducted in accordance with generally accepted government auditing standards by an independent auditor and submitted in a form determined by the OTDA. The OTDA will report its findings and any recommendations to the Contractor and may impose any sanctions as determined appropriate.

Reporting and Vouchering Requirements

The New York State Refugee and Immigrant Data Portal, or any alternative portal approved for use by this program by NYS Information Technology Services (hereafter referred to as “SUNDIAL”), is to be used by contractors to submit progress reports and claims for payment.

The contractor must have sufficient equipment and a system environment to use the SUNDIAL system, as follows:

- Desktop or laptop computer(s) with internet access
- Web browsers Microsoft Edge and Google Chrome

For transmitting sensitive and confidential data, the contractor must use SUNDIAL and maintain the confidentiality and privacy of data submitted through SUNDIAL in conformity with the obligations more fully spelled out in NYS Policies, OTDA’s Attachment A-1, and the Bureau of Refugee Services’ service provider handbook.

Reports and vouchers must be submitted by the contractor on a quarterly basis during the contract unless otherwise specified. Payments will be based on accurately submitted financial claim summaries and necessary documentation supporting the eligible expenditures in the budget summary. Additional reporting, as may be determined by OTDA, may also be required.

Individuals who will be authorized to access SUNDIAL, or who will otherwise have access to Protected Information, as that term is defined in Attachment A-1, will be required to sign the standard Non-Disclosure Agreement (NDA), which is available for review in SFS. Applicants are encouraged to review the sample Master Contract for Grants, all Attachments thereto, and the NDA prior to submitting a proposal.

After the end of a budget period quarter, the contractor generates from SUNDIAL a Claim for Payment and Financial Claim Report for contractor review and subsequent submission to OTDA for payment. In addition to SUNDIAL generated reports, documentation substantiating the financial claim report is required to be uploaded in the Supporting Documentation web browser in SUNDIAL. This documentation must be maintained on site by the contractor and must be accessible for review by OTDA at any time.

Additionally, contractors are required to complete an ORR-6 Schedule A Narrative on a bi-annual basis. This is an opportunity for your agency to share success stories, emerging trends, new initiatives, and obstacles. Providing this information supports our efforts to gather and analyze data, enhance programming, and inform decision making

Case Records

The contractor must adhere to OTDA instructions and requirements regarding case records as stated in the contract and in related directives, forms of notification and OTDA manuals that may be found on OTDA's website.

Monitoring

OTDA will monitor projects on a regular basis throughout the contract's duration. Monitoring may include site visits, regular telephone contact and/or discussions of monthly progress reports. The goals of project monitoring are to determine whether the terms of the contract are being met and to provide technical assistance, where necessary, to help the contractor meet these terms. OTDA reserves the right to conduct site visits and make telephone contact with subcontractors as a means of monitoring the prime contractor's performance.

Selected contractors are expected to provide services aligned with the goals of this program. As part of OTDA program oversight, the agency will monitor services provided to assess the extent to which those services are necessary and appropriate.

Amendments to the Contract

Amendments and modifications of executed contracts are sometimes necessary to accommodate the needs of both the contractor and OTDA. These changes, which must be by mutual written agreement, may include modification to reimbursement schedules, time and money amendments, or no-cost extensions as necessary. Contract modifications, including amendments and no-cost time extensions, will be made at the discretion of the OTDA with the approval of the Attorney General and the Office of the State Comptroller.

XIV. General Terms and Conditions

This RFP does not obligate OTDA to award any contracts or to reimburse the expenses incurred in preparing a response to this RFP, nor does it obligate OTDA to amend any existing contract for services.

Any contract awarded pursuant to this RFP will be subject to OTDA's processing procedures for contracts of this type, including approval as to form by the State's Attorney General and by the NYS Office of the State Comptroller.

It is the policy of OTDA to encourage the employment of qualified applicants/recipients of public assistance by both public organizations and private enterprises that are under contractual agreement with OTDA for the provision of goods and services. OTDA may require the contractor to demonstrate how the contractor has complied or will comply with the aforesaid policy.

Subject to the availability of funds, the contract award will be made to the applicants whose proposals are determined to best meet the criteria for proposal evaluation and selection set forth in this RFP.

This RFP and any contract resulting from this RFP are subject to all applicable laws, rules, regulations, policies, guidance, and programmatic requirements promulgated by any Federal and State authority having jurisdiction over the subject matter thereof.

The contractor will be required to comply with all applicable Federal and State laws, regulations, policies, guidance and programmatic requirements. The contractor must also comply with applicable New York State Executive Orders.

OTDA reserves the following additional rights:

- To change any of the scheduled dates stated in this RFP.
- To fund any or all proposals received in response to this RFP.
- To make multiple awards for all regions should additional funds become available.
- To award contract(s) to as many or as few applicants as it may select.
- To make multiple awards per region if a lack of viable applicants results in a balance of funds to be awarded, and/or multiple awards per region are required to address State priorities and needs.
- To accept or reject any or all proposals that do not completely conform to the requirements or instructions given in this RFP, including time frames for submission thereof.
- To reject any proposals submitted and amend, withdraw or postpone this RFP at any time without notice, and without liability, to any bidder, or other party, for expenses incurred in the preparation of any proposals submitted in response to this RFP.

- To request all bidders who submitted proposals to present supplemental information clarifying their proposal either in writing or by formal presentation, for the purpose of assuring a full and complete understanding of an offeror's proposal and/or to determine an offeror's compliance with the requirements of this solicitation. The award of the contract, if any, may be made with reliance on additional information requested.
- To make funding decisions that maximize compliance with and address the goals identified in this RFP.
- To make an award under this RFP in whole or in part, funding only one portion, or selected activities, of a selected bidder's proposal; and/or adopt all or part of the selected bidder's proposal based on State requirements.
- To eliminate any RFP requirements unmet by all bidders, upon notice to all parties that submitted proposals.
- To waive procedural technicalities, or modify minor irregularities, in proposals received, after notification to the bidder involved.
- To correct arithmetic errors in any proposal, or make typographical corrections to a proposal, with concurrence of the bidder.
- To conduct contract negotiations with the next responsible bidder(s), should the agency be unsuccessful in negotiating with the selected bidder(s).
- To use the proposal submitted in response to this RFP as part of an approved contract. At the time of contract development, awardees may be requested to provide additional budget and program information for the final contract.
- To make additional awards based on the remaining proposals submitted in response to this RFP and/or to provide additional funding to awardees if additional funds become available, using the same scoring criteria and award methodology in lieu of releasing a new RFP, if deemed to be in the best interest of the State. OTDA also reserves the right to issue a new RFP to solicit new proposals.
- To make inquiries of third parties, including but not limited to bidders' references, use proposal information obtained through site visits, management interviews and the State's investigation of a bidder's qualifications, experience, ability or financial standing, and any material or information submitted by the bidder in response to the agency's request for clarifying information in the course of evaluation and/or selection under this RFP. By submitting a proposal in response to this RFP the applicant gives its consent to any inquiry made by OTDA.
- To negotiate with the selected bidder(s) prior to contract award.
- To negotiate any aspect of a proposal in order to ensure that the final agreement meets OTDA objectives and requirements.
- To require contractors to participate in a formal evaluation of the program to be developed by OTDA. Contractors may be required to collect data for these

purposes. The evaluation design will maintain confidentiality of participants and recognize practical constraints of collecting this kind of information.

- To consider statewide distribution and regional distribution within New York City including borough distribution methodology, in evaluating proposals.
- To use any and all ideas submitted in the proposals received.
- To terminate the contract in whole or in part or modify it at its discretion or due to the unavailability of funds. Such termination shall not affect obligations incurred under the contract prior to the effective date of such termination.
- When funds are advanced any unexpended balance or funds unaccounted for at the end of the approved period or at the time of termination must be returned.

The terms and conditions for all funded projects are specified in a detailed contract which must be signed by OTDA and approved by the New York State Attorney General's Office and the Office of the State Comptroller before any work is to begin or payments are made. The successful applicant will be sent the complete standard contract for execution. Before submitting the application, Applicants must review the Attachments that are available to download from SFS, as successful applicants will be expected to comply with the terms and conditions specified therein. These Attachments will become a part of any contract that is developed with successful applicants as a result of this RFP.

The following will be incorporated into any contracts resulting from this RFP:

- NYS Master Contract for Grants Face Page;
- NYS Master Contract for Grants (Terms and Conditions);
- Appendix A (Standard Clauses For New York State Contracts);
- Attachment A-1 (Agency-specific Terms and Conditions);
- Attachment A-2 (Program-specific Terms and Conditions);
- Attachment A-3 (Federally Funded Grants and Requirements Mandated by Federal Laws);
- Attachment B-2 (Performance-Based Budget);
- Attachment C (Work Plan); and
- Attachment D (Payment and Reporting Schedule).

All plans and working documents prepared by the applicant under the contract to be awarded will become the property of the State of New York. All products, deliverable items and working papers resulting from this contract will be the sole property of OTDA and the applicant is prohibited from releasing these documents to any persons other than the Commissioner of the Office of Temporary and Disability Assistance or their designee unless authorized by OTDA to do so.

OTDA reserves a royalty free non-exclusive license to use and to authorize others to use all copyrighted material resulting from this project.
All reports of investigations, studies and publications made as a result of this proposal must acknowledge the support provided by OTDA.

All protected information, as that term is defined in Attachment A-1, concerning individuals served or studies conducted under the project are confidential and such information may not be disclosed to unauthorized persons, corporations, or agencies.

Successful applicants will be subject to the State's prompt contracting law. The proposal shall be signed by an official authorized to bind the applicant and shall contain a statement to the effect that the proposal is a firm offer for a 180-day period. The proposal shall also provide the name, title, address, telephone number and area code of individuals with authority to negotiate and contractually bind the corporation or municipality and who may be contacted during the period of proposal evaluation.

XV. Participation Opportunities for New York State Certified Service-Disabled Veteran-Owned Businesses

Article 3 of the New York State Veterans' Services Law provides for more meaningful participation in public procurement by certified Service-Disabled Veteran-Owned Businesses ("SDVOBs"), thereby further integrating such businesses into New York State's economy. The OTDA recognizes the need to promote the employment of service-disabled veterans and to ensure that certified service-disabled veteran-owned businesses have opportunities for maximum feasible participation in the performance of OTDA contracts.

In recognition of the service and sacrifices made by service-disabled veterans and in recognition of their economic activity in doing business in New York State, Bidders/Contractors are strongly encouraged to consider SDVOBs in the fulfillment of the requirements of the Contract.

For purposes of this procurement, OTDA conducted a comprehensive search and determined that the Contract does not offer sufficient opportunities to set specific goals for participation by SDVOBs as subcontractors, service providers and suppliers to the Contractor. Nevertheless, the Bidder/Contractor is encouraged to make good faith efforts to promote and assist in the participation of SDVOBs on the Contract for the provision of services and materials. Such participation may be as subcontractors or suppliers, as protégés, or in other partnering or supporting roles. The directory of New York State Certified SDVOBs can be viewed at: https://ogs.ny.gov/veterans/.

The Bidder/Contractor is encouraged to contact the Office of General Services' Division of Service-Disabled Veteran's Business Development by phone at 518-474-2015 or by email at VeteransDevelopment@ogs.ny.gov to discuss methods of maximizing participation by SDVOBs on the Contract.

XVI. Executive Order 190: Incorporating Health Across All Policies into State Agency Activities

Per Executive Order 190, this RFP incorporates the New York State Prevention Agenda and the World Health Organization (WHO) Eight Domains of Livability to further the Health Across All Policies initiative.

The New York State Prevention Agenda is the blueprint for action to improve the health of New Yorkers and become the healthiest state for people of all ages. The five priority areas of the New York State Prevention Agenda are:

- Preventing Chronic Diseases
- Promoting a Healthy and Safe Environment
- Promoting Healthy Women, Infants and Children
- Promoting Well-Being and Preventing Mental Health and Substance Use Disorders
- Preventing Communicable Diseases

The WHO Eight Domains of Livability include:

1. Outdoor Spaces and Buildings
    - Providing safe, accessible places for the public to gather indoors and out. Ensuring that parks, sidewalks, safe streets, outdoor seating, and accessible buildings can be used and enjoyed by people of all ages.
2. Transportation
    - Increasing the accessibility, availability, and affordability of public transit options, as well as ensuring safe roadways.
3. Housing
    - Expanding affordable housing options for varying life stages, and enacting programs that help people remain in their homes longer to age in place.
4. Social Participation
    - Increasing access to affordable and community-based social activities can help address loneliness and isolation.
5. Respect and Social Inclusion
    - Increasing the availability of intergenerational activities and programs.
6. Civic Participation and Employment
    - Provide ways that all people, including older people, can, if they choose to, work for pay, volunteer their skills, and be actively engaged in community life.
7. Communication and Information
    - Providing information through a variety of means and in a culturally competent manner, recognizing that not everyone has a smartphone or internet access.

8. Community and Health Services
    - Ensuring accessible and affordable health services in every community.

The Health Across All Policies initiative is a collaborative approach that integrates health considerations into policymaking across all sectors to improve community health and wellness. To successfully improve the health of all communities, health improvement strategies must target social determinants of health and other complex factors that are often the responsibility of non-health partners such as housing, transportation, education, environment, parks and economic development.

Consistent with Executive Order 190, where requested in this RFP, applicants must describe how their proposals can improve community health and wellness through alignment and coordination with the New York State Prevention Agenda priorities and the WHO Eight Domains of Livability.

XVII. Contractor Requirements and Procedures for Business Participation Opportunities for New York State Certified Minority- and Women-Owned Business Enterprises and Equal Employment Opportunities for Minority Group Members and Women

Pursuant to New York State Executive Law Article 15-A and Parts 140-145 of Title 5 of the New York Codes, Rules and Regulations OTDA is required to promote opportunities for the maximum feasible participation of New York State-certified Minority and Women-owned Business Enterprises ("MWBEs") and the employment of minority group members and women in the performance of OTDA contracts.

Business Participation Opportunities for MWBEs

For purposes of this solicitation, OTDA hereby establishes an overall 30% M/WBE participation goal, and specific participation goals for both New York State-certified Minority-owned Business Enterprises ("MBE") and New York State-certified Women-owned Business Enterprises ("WBE") will be assessed based on the nonprofit's discretionary spending budget and participation opportunities therein. A contractor ("Contractor") on any contract resulting from this procurement ("Contract") must document its good faith efforts to provide meaningful participation by MWBEs as subcontractors and suppliers in the performance of the Contract. To that end, by submitting a response to this RFP, the respondent agrees that OTDA may withhold payment pursuant to any Contract awarded as a result of this RFP pending receipt of the required MWBE documentation. The directory of MWBEs can be viewed at: https://ny.newnycontracts.com. For guidance on how OTDA will evaluate a Contractor's "good faith efforts," refer to 5 NYCRR § 142.8.

The respondent understands that only sums paid to MWBEs for the performance of a commercially useful function, as that term is defined in 5 NYCRR § 140.1, may be applied towards the achievement of the applicable MWBE participation goal. [FOR CONSTRUCTION CONTRACTS – The portion of a contract with an MWBE serving as a supplier that shall be deemed to represent the commercially useful function performed by the MWBE shall be 60 percent of the total value of the contract. The portion of a contract with an MWBE serving as a broker that shall be deemed to represent the commercially useful function performed by the MWBE shall be the monetary value for fees, or the markup percentage, charged by the MWBE]. [FOR ALL OTHER CONTRACTS - The portion of a contract with an MWBE serving as a broker that shall be deemed to represent the commercially useful function performed by the MWBE shall be 25 percent of the total value of the contract]

In accordance with 5 NYCRR § 142.13, the respondent further acknowledges that if it is found to have willfully and intentionally failed to comply with the MWBE participation goals set forth in a Contract resulting from this RFP, such finding constitutes a breach of contract and OTDA may withhold payment as liquidated damages.

Such liquidated damages shall be calculated as an amount equaling the difference between: (1) all sums identified for payment to MWBEs had the Contractor achieved the contractual MWBE goals; and (2) all sums actually paid to MWBEs for work performed or materials supplied under the Contract.

By submitting a bid or proposal, a respondent agrees to demonstrate its good faith efforts to achieve the applicable MWBE participation goals by submitting evidence thereof through the New York State Contract System ("NYSCS"), which can be viewed at https://ny.newnycontracts.com, provided, however, that a respondent may arrange to provide such evidence via a non-electronic method by contacting the Contract's program manager at OTDA.

Additionally, a respondent will be required to submit the following documents and information as evidence of compliance with the foregoing:

- An MWBE Utilization Plan with their bid or proposal. Any modifications or changes to an accepted MWBE Utilization Plan after the Contract award and during the term of the Contract must be reported on a revised MWBE Utilization Plan and submitted to OTDA for review and approval.

OTDA will review the submitted MWBE Utilization Plan and advise the respondent of OTDA acceptance or issue a notice of deficiency within 30 days of receipt.

- If a notice of deficiency is issued, the respondent will be required to respond to the notice of deficiency within seven (7) business days of receipt by submitting to the OTDA a written remedy in response to the notice of deficiency. If the written remedy that is submitted is not timely or is found by OTDA to be inadequate, OTDA shall notify the respondent and direct the respondent to submit, within five (5) business days, a request for a partial or total waiver of MWBE participation goals. Failure to file the waiver form in a timely manner may be grounds for disqualification of the bid or proposal.

OTDA may disqualify a respondent as being non-responsive under the following circumstances:

- If a respondent fails to submit an MWBE Utilization Plan;
- If a respondent fails to submit a written remedy to a notice of deficiency;
- If a respondent fails to submit a request for waiver; or
- If OTDA determines that the respondent has failed to document good faith efforts.

The successful respondent will be required to attempt to utilize, in good faith, any MBE or WBE identified within its MWBE Utilization Plan, during the performance of the Contract. Requests for a partial or total waiver of established goal requirements made subsequent to Contract Award may be made at any time during the term of the Contract to OTDA but must be made no later than prior to the submission of a request for final payment on the Contract.

The successful respondent will be required to submit a quarterly M/WBE Contractor Compliance & Payment Report to OTDA, by the 8th day following each end of quarter over the term of the Contract documenting the progress made toward achievement of the MWBE goals of the Contract.

Equal Employment Opportunity Requirements

By submission of a bid or proposal in response to this solicitation, the respondent agrees with all of the terms and conditions of [Appendix A – Standard Clauses for All New York State Contracts including Clause 12 - Equal Employment Opportunities for Minorities and Women OR Authority equivalent to Appendix A]. The respondent is required to ensure that it and any subcontractors awarded a subcontract for the construction, demolition, replacement, major repair, renovation, planning or design of real property and improvements thereon (the "Work"), except where the Work is for the beneficial use of the respondent, undertake or continue programs to ensure that minority group members and women are afforded equal employment opportunities without discrimination because of race, creed, color, national origin, sex, age, disability or marital status. For these purposes, equal opportunity shall apply in the areas of recruitment, employment, job assignment, promotion, upgrading, demotion, transfer, layoff, termination, and rates of pay or other forms of compensation. This requirement does not apply to: (i) work, goods, or services unrelated to the Contract; or (ii) employment outside New York State.

The respondent will be required to submit a Minority and Women-owned Business Enterprise and Equal Employment Opportunity Policy Statement, Form OTDA-4970, to OTDA with its bid or proposal.

If awarded a Contract, respondent shall submit a Workforce Utilization Report, Form OTDA-4971, and shall require each of its Subcontractors to submit a Workforce Utilization Report, in such format as shall be required by OTDA on a QUARTERLY basis during the term of the Contract.

Further, pursuant to Article 15 of the Executive Law (the “Human Rights Law”), all other State and Federal statutory and constitutional non-discrimination provisions, the Contractor and sub-contractors will not discriminate against any employee or applicant for employment because of race, creed (religion), color, sex, national origin, sexual orientation, military status, age, disability, predisposing genetic characteristic, marital status or domestic violence victim status, and shall also follow the requirements of the Human Rights Law with regard to non-discrimination on the basis of prior criminal conviction and prior arrest.

Please Note: Failure to comply with the foregoing requirements may result in a finding of non-responsiveness, non-responsibility and/or a breach of the Contract, leading to the withholding of funds, suspension or termination of the Contract or such other actions or enforcement proceedings as allowed by the Contract.

Part B. Instructions for Completing the Application in the Statewide Financial System

Please read Part A of the SORP Request for Proposals carefully before completing the application. The entire SORP application must be submitted in SFS. Read and follow all instructions while completing the screens in SFS. In SFS, the application is often referred to as the "bid response."

* You will not be able to save a bid response (application) until you fill out both the contact info AND the Site/Project Address in "Step 1: Answer General Event Questions."

I. Searching for the Bid Event in the Statewide Financial System

For more detailed instructions please refer to the section Respond to Bid Event Performance Budget Types in the SFS Handbook: Grantee Processing in SFS (Grantee User Manual) for additional detailed instructions on responding to bid events and completing the application:

- Log into the SFS Vendor Portal.
- Click the "Grant Management – State" tile.
- Click the "Bid Event Search" tile.
- Type "SORP2025" in the Event ID field and then click Search.
- Select the appropriate Grant Opportunity and then click the "Bid on Event" button.
- From the Event Details page you may review the Event Start, Event End Date, Estimated Award Date and Anticipated Contract Date fields.
- Click the "Additional Bid Info" link and review the Additional Bid Info, then click "OK" to return to the Event Details page.
- Select the "Events Comments and Attachments" link, located at the bottom of the page to view any instructions, attachments and/or comments. You may need to scroll to see this link.

II. Attachments

Be sure to download, complete and upload all of the required attachments. SFS will not alert you if you forget an upload. All uploads must be in a non-fillable Adobe PDF file format.

- Click on the "Events Comments and Attachments" link at the bottom of the screen and you will then see a list of all the required attachments. The list of required attachments is also in Part C of this RFP. Click the “View” button to view and download attachments as necessary.

- Click the “OK” button after finishing viewing/downloading the instructions, attachments and comments.

III. Questions

- Use the scrollbar to navigate to the Step 1: Answer General Event Questions section and enter the appropriate information for each question.

- Click the “Site/Project Address” link and enter the appropriate address details. When you have finished entering address details click the “OK” button. The Site/Project Address is where the grant will be used, or funds will be spent.

- Next you will review and respond to Event Questions and upload appropriate documents where prompted, including your answers to the Program Specific Questions. Those that are flagged as Required (*) must be responded to in order to submit a bid response. The ability to add a Comment/Attachment will vary based on the question.

- Click the “Save for Later” button.

- In the resulting popup, click the “OK” button to save your progress.

IV. Budget

Complete the budget screens consistent with your Performance-Based Budget Worksheet (downloaded in the Attachments section). The total grant funds requested should be for the first twelve months of the contract. Only use whole dollar amounts for funds requested.

- Scroll to the bottom of the page. Under the Lines section, click the “Period Details” link under the Period column to access budget and work plan information.

- Click the “Budget Properties” link.

- Review the Budget Header Information. This section was completed by OTDA.

- Review the Budget Category Properties section (including Narrative), noting which rows have “Available in Grant” checked. This section was completed by OTDA to help the applicant understand which Budget Category requires a response.

- Under Budget Category Property section, click “Plus Sign (+)” to add new row(s).

- Enter the applicable deliverable into the Budget Category field.

- Click the “Available in Grant” checkbox so the budget category details can be entered for the category.

- Scroll down to the Period Budget Summary section and click on the “Category Details” icon on the right side to enter details for each Budget Category. The Type/Description field will be completed for you. Complete only the following fields: Grant Funds; Total Funds; Grant Amount per Unit; # of Units.

- Enter the applicable value into the Narrative field.

- Click the “OK” button.

- Under the Period Budget Summary section, click on the “Category Details” icon for additional budget categories and repeat the previous steps as needed.

- After clicking the “OK” button, click the “Save” button.

- Click the “Back” button.

- Click the “Work Plan Properties” link.

V. Work Plan

The Work Plan is composed of the Project Summary and the Objectives >> Tasks >> Performance Measures.
All tasks an applicant proposes to provide must be described in the Work Plan. You will enter your Work Plan into the “Project Summary” text box on the “Work Plan Header” page in SFS. Applicants are required to provide all deliverables.
The first section of the Work Plan should focus on Organizational Capacity and be a High-level Overview of the project. It should also be completed from an annual perspective.

While drafting this section of your Work Plan, be sure to address the following:

- Provide the service area, city(ies) and county(ies).
- Describe in detail why SORP funding is needed.
- Describe the members of your community that belong to the eligible population for this funding, as detailed in Part A, Section VIII. of the SORP RFP. List their countries of origin, any special needs or unique circumstances they may have and the barriers that may affect their ability to live healthy and independent lives.
- Describe how your agency has the capacity to engage and conduct outreach to the eligible population for this funding, as detailed in Part A, Section VIII. of the SORP RFP.
- Describe in detail how the services provided by your agency will meet the special needs and unique circumstances of the eligible population for this funding, as

detailed in Part A, Section VIII. of the SORP RFP, including how your agency proposes to address barriers to accessing services and information.

- Describe in detail how your agency will assist the eligible population for this funding, as detailed in Part A, Section VIII. of the SORP RFP to become self-sufficient and to live independently for as long as possible.
- Provide a high-level overview of the project, including the overall goals and desired outcomes, including information such as service location, hours of operation and overall number of persons to be served.
- Describe your organization's relevant experience and how you will utilize your current expertise and capacity to implement and support the services required by SORP.
- Describe in detail your agency staff's language capacity and cultural competency, and detail how services will be provided by agency staff in a culturally and linguistically appropriate manner.
- Describe how your staff will assist members of the eligible population for this funding, as detailed in Part A, Section VIII. of the SORP RFP, for whom the agency has no language capacity.
- Describe how your staff will receive regular training and updates on the latest immigration issues, especially those that affect older refugees.
- Describe other programs or services that your agency operates and how they will be used to enhance the effectiveness of the proposed program. Include information on your agency's capacity for providing both aging related services as well as non-aging related services (e.g., transportation, public benefits navigation, etc.).
- Describe your agency's established relationships with the local Office for the Aging, local social services districts and other agencies or service providers in the community and detail what specific resources participants will gain through these relationships.
- Describe how your service strategy can improve community health and wellness and align or coordinate with applicable New York State Prevention Agenda Priorities and the World Health Organization Eight Domains of Livability, consistent with Executive Order 190.

The second section of the Work Plan details the Service Strategy for program deliverables. While drafting this section of the Work Plan, be sure to address the following:

- Detail your service strategy for Cross Trainings, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), which types of agencies you propose to collaborate with and what gaps or needs you hope to address with the proposed collaboration.
- Detail your service strategy for Community Education Workshops, defining in sufficient detail the service delivery method (Who? What? When? Where?

How?), the topics you propose to discuss and the needs these workshops will address.

- Describe how barriers to attending Community Education Workshops will be removed so the maximum number of participants may attend (e.g., describe transportation services that will be offered to participants).
- Detail your service strategy for Socialization and Community Engagement, defining in sufficient detail the service delivery method (Who? What? When? Where? How?) and the activities you propose to provide participants.
- Describe your plans for how Socialization and Community Engagement activities will provide participants with educational stimulation and address social isolation.
- Describe your plans for Socialization and Community Engagement activities that will promote social inclusion providing opportunities for participants to meet and socialize with other domestic seniors at events.
- Detail your service strategy for Assessments, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), including a description of any assessment tools you may use, and how such tools/methods will ensure that you will enroll only eligible participants. Be sure to include details on your agency’s process for:
  - Scheduling intake and determining eligibility of a prospective client.
  - Performing an assessment of needs.
  - Creating a Case Management Plan.
- Detail your service strategy for Housing Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency’s process for updating and adjusting the Case Management Plan.
- Detail your service strategy for Public Benefits Application Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency’s process for updating and adjusting the Case Management Plan.
- Detail your service strategy for Medical/Mental Health Care and Counseling, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency’s process for updating and adjusting the Case Management Plan.
- Detail your service strategy for Supportive Services, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency’s process for updating and adjusting the Case Management Plan.
- Detail your service strategy for Legal Services, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include

details on your agency’s process for updating and adjusting the Case Management Plan.

- Detail your service strategy for Food and Nutritional Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency’s process for updating and adjusting the Case Management Plan.
- Detail your service strategy for Naturalization Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency’s process for updating and adjusting the Individual Naturalization Plan.
- Describe your Naturalization Assistance strategies that incorporate all available pathways to become a US citizen (e.g., USCIS 55/15 and 65/20 exemptions).
- Describe your Naturalization Assistance strategies to provide comprehensive case management to help participants obtain an N-648, Medical Certification for Disability Exceptions waiver.
- Detail your service strategy for Interpretation and Translation Service, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).
- Detail your service strategy for Services to Older Refugees Five-Years Post Arrival Naturalization Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).
- Describe any current or proposed relationships with other service providers who may work with your agency to coordinate services. In addition, if your agency will have a subcontractor(s) perform certain services, indicate the specific services that the subcontractor(s) will provide.
- After completing the Project Summary scroll down and click save.

Objectives >> Tasks >> Performance Measures:

The Objectives, Tasks and Performance Measures are pre-defined in SFS and there is nothing that applicants must add in this section.

* All of the Objectives, Tasks and Performance Measures are pre-defined in SFS. It is unnecessary to create additional Performance Measures, but in the event that you do create a Performance Measure, either delete it or complete the description field and then click the More Details tab and select the “Text/Comment” option for Performance Measure Response Type. Failure to do so may result in application errors and prevent application submission.

- When you have added descriptions for all Objectives, Tasks and Performance Measures click the “Save” button.

- Click the “Back” button.
- Click the “Return to Bid Response” link.
- Enter in the “Your Unit Bid Price” field the total Grant Funds Requested amount for the first budget period in order to submit the bid response.
- When you are ready to submit your bid response, click the “Submit Bid” button.
- In the resulting popup, click the “Yes” button to confirm you would like to submit the bid.

Part C – List of Attachments and Forms to Upload

Upload all required forms in the places designated throughout the application. All forms must be uploaded as a non-fillable PDF. OTDA will not accept other formats.

- **Program Specific Questions**
  - Answer all of the questions as fully as possible. Convert to a non-fillable PDF and upload with the application.
- **NYS Sample Master Contract for Grants**
  - This document is made available for your review.
- **Attachment A-1 (Agency-specific Terms and Conditions)**
  - This document is made available for your review.
- **Attachment A-2 (Program-specific Terms and Conditions)**
  - This document is made available for your review.
- **Attachment A-3 (Federally Funded Grants and Requirements Mandated by Federal Laws)**
  - This document is made available for your review.
- **NYS OTDA Non-Disclosure and Confidentiality Agreement**
  - This document is made available for your review.
- **Agency Agreement Form**
  - Sign, complete, convert to a non-fillable PDF and upload with the application.
- **EO 16 Certification**
  - Sign, complete, convert to a non-fillable PDF and upload with application.
- **EO 177 Certification**
  - Sign, complete, convert to a non-fillable PDF and upload with the application.
- **Performance-Based Budget Worksheet**
  - Fill in the appropriate values in the highlighted cells for the first budget year. Be sure to input payment rates in column C that do not exceed the maximum allowable payment rates listed in Part A, Section X. of the SORP RFP. Convert to a non-fillable PDF and upload with the application.
- **Gender-Based Violence and the Workplace Certification**
  - Sign, complete, convert to a non-fillable PDF and upload with the application.
- **General Information Form**
  - Complete all applicable sections, convert to a non-fillable PDF and upload with the application.
- **Letter of Support from the Local Office for the Aging (Optional)**

    - Convert to a non-fillable PDF and upload with the application.
- **Non-Collusive Bidding Certification**
    - Sign, complete, convert to a non-fillable PDF and upload with the application.
- **Offeror's Acknowledgment of Understanding of Post-Employment Provisions**
    - Sign, complete, convert to a non-fillable PDF and upload with the application.
- **Offeror's Assurance of No Conflict of Interest or Detrimental Effect**
    - Sign, complete, convert to a non-fillable PDF and upload with the application.
- **OTDA 4934 Equal Employment Opportunity Staffing Plan**
    - Complete all applicable sections, convert to a non-fillable PDF and upload with the application.
- **OTDA 4937 MWBE Utilization Plan**
    - Complete all applicable sections, convert to a non-fillable PDF and upload with the application.
- **OTDA 4938 MWBE Letter of Intent to Participate**
    - Sign, complete, convert to a non-fillable PDF and upload with the application.
- **OTDA 4970 MWBE and EEO Policy Statement**
    - Complete all applicable sections, convert to a non-fillable PDF and upload with the application.
- **OTDA 4976 MWBE Certification of Good Faith Efforts**
    - Sign, complete, convert to a non-fillable PDF and upload with the application.
- **Sexual Harassment Prevention Certification**
    - Sign, complete, convert to a non-fillable PDF and upload with the application.

Applicants are required to complete the **New York State Vendor Responsibility Questionnaire Not-For-Profit Business Entity**, but it is not a required upload in SFS. Instructions on how to complete and file the Questionnaire can be found on the VendRep website.

The **Confidentiality/Non-Disclosure Agreement** is not a required upload in SFS. Upon award and approval of a resulting contract, it will be required to be signed by each of the contractor’s staff who have access to OTDA information. The contractor would keep the signed forms on file and would need to produce them upon request.

Part D – Printed Version of Program Specific Questions

Program Specific Questions

Instructions: Please answer all Program Specific Questions, convert to a non-fillable PDF and upload with the application in SFS.

1. Provide the service area, city(ies) and county(ies).
2. Describe in detail why SORP funding is needed.
3. Describe the members of your community that belong to the eligible population for this funding, as detailed in Part A, Section VIII. of the SORP RFP. List their countries of origin, any special needs or unique circumstances they may have and the barriers that may affect their ability to live healthy and independent lives.
4. Describe how your agency has the capacity to engage and conduct outreach to the eligible population for this funding, as detailed in Part A, Section VIII. of the SORP RFP.
5. Describe in detail how the services provided by your agency will meet the special needs and unique circumstances of the eligible population for this funding, as detailed in Part A, Section VIII. of the SORP RFP, including how your agency proposes to address barriers to accessing services and information.
6. Describe in detail how your agency will assist the eligible population for this funding, as detailed in Part A, Section VIII. of the SORP RFP to become self-sufficient and to live independently for as long as possible.
7. Provide a high-level overview of the project, including the overall goals and desired outcomes, including information such as service location, hours of operation and overall number of persons to be served. Describe service delivery, general goals and outcomes of the project. Include hours of operation and location of services.
8. Provide a brief overview and history of your agency. Include your agency's experience in serving the eligible population(s) and how you will utilize your current expertise and capacity to implement and support the services required by SORP.
9. Describe other programs or services that your agency operates and how they will be used to enhance the effectiveness of the proposed program.
10. Describe in detail your agency staff's language capacity and cultural competency, and detail how services will be provided by agency staff in a culturally and linguistically appropriate manner.
11. Describe how your staff will assist members of the eligible population for this funding, as detailed in Part A, Section VIII. of the SORP RFP, for whom the agency has no language capacity.
12. Describe how your staff will receive regular training and updates on the latest immigration issues, especially those that affect older refugees.

13. Describe other programs or services that your agency operates and how they will be used to enhance the effectiveness of the proposed program. Include information on your agency's capacity for providing both aging related services as well as non-aging related services (e.g., transportation, public benefits navigation, etc.).
14. Describe your agency's established relationships with the local Office for the Aging, local social services districts and other agencies or service providers in the community and detail what specific resources participants will gain through these relationships.
15. Describe how your service strategy can improve community health and wellness and align or coordinate with applicable New York State Prevention Agenda Priorities and the World Health Organization Eight Domains of Livability, consistent with Executive Order 190.
16. How will duplication of efforts for the same population and activities be avoided?
17. Detail your service strategy for Cross Trainings, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), which types of agencies you propose to collaborate with and what gaps or needs you hope to address with the proposed collaboration.
18. Detail how your Cross Training plans will involve the domestic senior community.
19. Detail your service strategy for Community Education Workshops, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), the topics you propose to discuss and the needs these workshops will address.
20. Describe how barriers to attending Community Education Workshops will be removed so the maximum number of participants may attend (e.g., describe transportation services that will be offered to participants).
21. Detail your service strategy for Socialization and Community Engagement, defining in sufficient detail the service delivery method (Who? What? When? Where? How?) and the activities you propose to provide participants.
22. Describe your plans for how Socialization and Community Engagement activities will provide participants with educational stimulation and address social isolation.
23. Describe your plans for Socialization and Community Engagement activities that will promote social inclusion providing opportunities for participants to meet and socialize with other domestic seniors at events.
24. Detail your service strategy for Assessments, defining in sufficient detail the service delivery method (Who? What? When? Where? How?), including a description of any assessment tools you may use, and how such tools/methods will ensure that you will enroll only eligible participants. Be sure to include details on your agency's process for:
    - Scheduling intake and determining eligibility of a prospective client;
    - Performing an assessment of needs;
    - Creating a Case Management Plan.

25. Detail your service strategy for Housing Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
26. Detail your service strategy for Public Benefits Application Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
27. Detail your service strategy for Medical/Mental Health Care and Counseling, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
28. Detail your service strategy for Supportive Services, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
29. Detail your service strategy for Legal Services, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
30. Detail your service strategy for Food and Nutritional Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Case Management Plan.
31. Detail your service strategy for Naturalization Assistance, defining in sufficient detail the service delivery method (Who? What? When? Where? How?). Be sure to include details on your agency's process for updating and adjusting the Individual Naturalization Plan.
32. Describe your Naturalization Assistance strategies that incorporate all available pathways to become a US citizen (e.g., USCIS 55/15 and 65/20 exemptions).
33. Describe your Naturalization Assistance strategies to provide comprehensive case management to help eligible SORP clients obtain an N-648, Medical Certification for Disability Exceptions waiver.
34. Detail your service strategy for Services to Older Refugees Five-Years Post Arrival referrals, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).
35. Describe any current or proposed relationships with other service providers who may work with your agency to coordinate SORP services. In addition, if your agency will have a subcontractor(s) perform certain services, indicate the specific services that the subcontractor(s) will provide.
36. Detail how your agency will proactively monitor program goals on a regular basis, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).

37. Detail your agency’s process for holding regular internal meetings with staff to review refugee needs and your agency’s capacity to meet them so that service delivery remains current and effective, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).
38. Detail how your agency will perform data entry of all participant services into the SUNDIAL system and also document them in client case files, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).
39. Detail how your agency will submit quarterly vouchers on a timely basis, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).
40. Detail how your agency will review participant files on a timely basis to ensure proper documentation, defining in sufficient detail the service delivery method (Who? What? When? Where? How?).
41. What are the strengths of your program considering the eligible population(s)?
42. What challenges has your program been working to overcome and how? If this is a new program, what challenges do you anticipate and how will you work to overcome?
43. In the past five years, has your agency or program been audited or reviewed by government agencies? If so, which ones and what were the results? Describe how any negative findings were resolved.
44. How will it be determined that a potential participant is eligible for the program?
45. Discuss what supportive services will be available and the process for referrals. Discuss how the services will assist participants with housing stability and independent living.
46. Discuss the average length of engagement for program participants.